



Your Marketing Checklist

To build and grow your financial services business



Working with your team, business partner or external provider, work through this checklist and decide which marketing strategies are right for your business.

Knowing that results only come from the actions we take in a business, nominate who will be responsible for developing the suggested marketing strategy. **Accountability = actions = results!**

MARKETING ACTION	WHO	WHEN	NOTES
Word of mouth - strategy & process developed			
SEO - keywords identified and used			
Value offer has been created and is shared with all			
Blog has been set up			
Content calendar created			
Joint venture marketing opportunities identified (non FS)			
Free press			
Paid advertising			
Sponsorship that makes sense			
Corporate social responsibility			
Client newsletter - regular			
Strategic alliance newsletter			
Online client surveys			
Face to face client surveys - third party			
LinkedIn - profiles aligned and leveraged			
Twitter - set up and utilised			
G+ -to be found online			
Set up auto responders			
Client event seminars (single and JV)			
Case studies			
Social proof everywhere			
Corporate brochure - sales tool, referral tool			
Referral strategy written			
Referral process written			
Facebook - focus on social and value. Advertise on.			
Website reviewed and tweaked regularly			
Branding everywhere with purpose			
Digital strategy written			
Digital action plan outlined			
Video marketing			
Podcasting			
Online seminars			
Social media employee policy written and signed			

The list can go on! The message is to do something! In an ever increasing competitive profession, the way in which you position and market your business will lead to success or failure.

For more information and help contact me, rachel@srscc.com.au | www.srscc.com.au



Be different. Be better. Achieve.